**≗ Fermilab**

Lessons Learned


# Fermilab Directorate web redo

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PREPARED BY:
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# Lessons Learned Approvals

| Name | Signature | Date |
|------|-----------|------|
| Tim Meyer | | |
| Katie Yurkewicz | | |
| Bill Boroski | | |
| | | |
| | | |

# Table of Contents

## 1. Participants

| PARTICIPANT NAME | DEPARTMENT / TITLE | ROLE | PHONE NUMBER |
|---|---|---|---|
| Maura Barone | OCOO | Project Lead | x4690 |
| Matt Crawford | OCIO | Project Manager | x3461 |
| Kathryn Duerr | CCD/IR | Records Adminstrator | x5693 |
| Leah Hesla | OOC | Editor | x5136 |
| Valerie Higgins | CCD/IR | Archivist | x2543 |
| Tim Meyer | COO | Sponsor | x6650 |

## 2. Highlighted points

- Do not use a web site as a file and document repository in the future.
- Get an agreement at the outset for a turnaround time between the project team and the customer/sponsor of any web site development project.

## 3. Feedback Received

### A. Project Team Feedback

| NAME / ROLE | COMMENT | PHASE |
|---|---|---|
| **Control of the project scope** | | |
| Matt Crawford / PM | The scope of the project was well defined at the start regarding existing content, but the stakeholders introduced requirements for new content along the way. I consider this appropriate for a web modernization project, and some attempt should be made to take it into account at the start of future such projects. | Execution |
| Tim Meyer / Sponsor | It was a challenge to define scope to a group of infrequent users.  As in, what we mean by "the directorate website" was not well established among Nigel, Hema, Tim, Maura, and Katie.  It got worked out in the end, but there was some initial confusion when people thought we meant the public-facing pages in general or just the page that lists the senior team, and so on. | Definition |
| Maura Barone / Project Lead | When this project started, the management system we wanted to use was not available yet at the lab. We invested time and resources working at the new pages templates and user interface. | Planning |

| NAME / ROLE | COMMENT | PHASE |
|---|---|---|
| **Organization of the work** | | |
| Leah Hesla / Editor | In the end, the redo of the directorate website resulted in a significant paring down of the original site. The old site was treated as a document storehouse, we recognized that we should not carry over this function – completely wrong for a website – to the new one, especially since there are online tools that take care of this. This is what website modernization is for. | Execution |
| Valerie Higgins / Archivist | We needed to preserve the original website because it contained many valuable records documenting Fermilab's activities, especially since it was used as a document storage space. We ended up crawling the public portions of the website and storing both that crawl and the entire contents of the website in Archives storage space. | Execution |
| Kathryn Duerr / Records Administrator | Too often, records are an afterthought when it comes to projects of this nature.  It was  good that records were included in the project scope. | Planning |
| **Coordination with customers** | | |
| Matt Crawford / PM | When feedback, new requirements and approvals were requested from the customer, they were often slow in coming. | Execution |
| Tim Meyer / Sponsor | How and when to declare victory?  If you were to ask Nigel right now, he might not be sure whether the project is complete or not. | Execution |
| **Notes for web sites in general** | | |
| Maura Barone / Project Lead | The directorate site was over 20 years old. Many things changed and evolved significantly in those years, both in the structure of the directorate and in web technologies. Websites should be kept more up-to-date in content and technology and be agile enough to evolve along with the laboratory. Waiting 20 years resulted in an almost unmanageable endeavor, rather then a simple site migration. | — |

### B.  User-Related Feedback

| NAME / ROLE | COMMENT | PHASE |
|---|---|---|
| **Content Management** | | |
| Maura Barone / Project Lead | The choice of the document & content management systems turned out to be more constraining than originally defined. We were given the choice to select among the systems available at the lab, with the constraint that the system we considered optimal for publishing webpages could not be used for document management. | Planning |
| Maura Barone / Project Lead | It took a lot of time to explain customers that they needed to use different systems for handling webpages and documents. The could not immediately understand why the new system used for the webpages could not be used for managing document. This also meant more training, and made more difficult the initial site setup. | Execution |
| **Access Control** | | |
| Maura Barone / Project Lead | Some of the customers needed to publish on their websites restricted information and make it available to people without a Fermilab account. While this requirement could easily be satisfied in the old system, it was not a supported feature in the new systems. The solution we found is a compromise, not ideal and not as efficient as it was in the past. | Execution |

## 4.  What Was Done Well

| WHAT WAS DONE WELL | PHASE |
|---|---|
| Although the size of the old site compelled us to take some months to arrive at the right path for the new one, we successfully came to consensus about what a directorate site should contain and how it should relate to other sites. | Execution |
| We organized the information into a site that was easily navigable. | Execution |
| We were able to preserve all the old content in Archives storage space. | Execution |
| Turning the large quantity of records that had been stored in the old site over to Kathryn Duerr, Records Administrator, and Valerie Higgins, lab archivist, ensured that DOE records procedures were followed. | Execution |
| This project has been laying down the path for website migrations at the lab, including defining a common site migration process and steps to follow for a succesfull rollout. | All |
| The new websites are optimally structured. Customers have been empowered to maintain the content themselves and don't have to rely on experts for making simple changes. Information became more easily findable. | Execution |

## 5. What Could Have Been Done Better

| WHAT COULD HAVE BEEN DONE BETTER | PHASE |
|---|---|
| Enforce deadlines. | Execution |
| For the next redo: we should define who and who isn't in the directorate – or perhaps abandon use of the word altogether. | Definition |
| In the future, it will make archiving websites much easier if they are not used for storage of documents, since the crawler sometimes can't find and capture those documents. | — |
| We could have worked in parallel with the customers to minimize the waiting time due to people being slow in providing feedback or reviewing material. | Execution |